

**RECORDS RETENTION AND DISPOSITION SCHEDULE  
GENERAL SCHEDULE NO. 7  
PUBLIC UTILITIES RECORDS  
COUNTY AND MUNICIPAL GOVERNMENTS  
PUBLIC UTILITIES DEPARTMENTS**

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The schedule on the attached page(s) is approved with agreement to follow the records retention and disposition conditions listed below:

**APPROVED: Robert F. Nawrocki, STATE RECORDS ADMINISTRATOR**

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**CONDITIONS FOR RECORDS RETENTION AND DISPOSITION**

1. This schedule is continuing authority under the provisions of the Virginia Public Records Act, §§ 42.1-76, et. seq. of the *Code of Virginia* for the retention and disposition of the records as stated on the attached page(s).
2. This schedule supersedes previously approved applicable schedules.
3. This schedule is used in conjunction with the *Certificate of Records Disposal* (Form RM-3). A signed RM-3 must be approved by the designated records officer and on file in the agency or locality before records can be destroyed. After the records are destroyed, the original signed RM-3 must be sent to Library of Virginia (LVA).
4. Any records created before the Constitution of 1902 came into effect (January 1, 1904) must be offered, in writing, to the LVA before applying these disposition instructions. Offered records can be destroyed 60 days after date of the offer if no response is received from the LVA. A copy of the offer must be attached to the RM-3 form when it is submitted to the LVA.
5. All known audits and audit discrepancies regarding the listed records must be settled before the records can be destroyed.
6. All known investigations or court cases involving the listed records must be resolved before the records can be destroyed. Knowledge of subpoenas, investigations or litigation that reasonably may involve the listed records suspends any disposal or reformatting processes until all issues are resolved.
7. The retentions and dispositions listed on the attached page(s) apply regardless of physical format, i.e., paper, microfilm, electronic storage, optical imaging, etc. Unless prohibited by law, records may be reformatted at agency or locality discretion. Microfilming must be done in accordance with §§ 17VAC15-20-10, et. seq. of the *Virginia Administrative Code*, "Standards for the Microfilming of Public Records for Archival Retention."
8. Custodians of records must ensure that information in confidential or privacy protected records is protected from unauthorized disclosure through the ultimate destruction of the information. Normally, destruction of confidential or privacy-protected records will be done by shredding or pulping. "Deletion" of confidential or privacy-protected information in computer files or other electronic storage media is not acceptable. Electronic records must be "wiped" clean or the storage media physically destroyed.
9. Under the Virginia Public Records Act, (§ 42.1-79) the Library of Virginia is the official custodian and trustee of all state agency records transferred to the Archives, Library of Virginia. The Library may purge select records in accordance with professional archival practices in order to ensure efficient access.

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RECORDS SERIES AND DESCRIPTION

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This schedule is divided into the following sections:

- A. General Utility Records
- B. Dam Construction, Operation and Maintenance Records.
- C. Permit Records
- D. System Design and Construction Records
- E. Wastewater System Records
- F. Waterworks Systems Records
- G. Water Well Records

**A. General Utilities Records**Abandoned Utility Line Records

005520

Retain until abandoned line is removed, then destroy.

This series documents the location of abandoned utility lines, excluding service lines connected to single-family dwellings. Code requires documentation on lines abandoned after July 1, 2002, files may include lines abandoned before that date, if available. Refer to *Code of Virginia* § 56-265.19(G).

Administrative Records

These series document the common functions and administration of various types of offices; records not otherwise listed on this schedule.

Refer to *General Records Retention and Disposition Schedule No. 19, Administrative Records* for retention periods.



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Disaster Recovery Files

005521

Retain 5 years after claims filed or written off, then destroy.

This series consists of records created to document and recover expenses for disaster recovery in a Federally declared disaster. Records may include damage reports, repair reports, expense records and supporting documentation.

Electronic Records

Consists of created or stored information held in any electronic format; records not otherwise listed on this schedule.

Refer to *General Records Retention and Disposition Schedule No. 23, Electronic Records* for retention periods.

Fiscal Records

These series document the expenditure of funds, accounting for funds, routine purchases and other activities of an accounting or financial nature; records not otherwise listed on this schedule.

Refer to *General Records Retention and Disposition Schedule No. 2, Fiscal Records* for retention periods.

Fuel Accounting Records

005522

Retain 3 years after the end of the fiscal year, then destroy.

This series documents the control of fuel received by public utilities. Series includes receipt records, consumption records, measuring records, stock control records and related supporting documentation.

General Services Records

These series document functions such as automotive operations, buildings and grounds maintenance, general equipment maintenance, hazardous materials, mail distribution, risk management, security, and telecommunications; records not otherwise listed on this schedule.

Refer to *General Records Retention and Disposition Schedule No. 16, General Services Records* for retention periods.



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Meter Reading Records

005523

Retain 3 years after end of billing cycle or until audited, whichever is longer, then destroy.

This series consists of information collected from individual meters, by manual or electronic means, and used to calculate the utility bill.

Meter History Records

005524

Retain for the life of the meter, then destroy.

This series documents the service and repair history of individual meters.

Meter Testing and Calibration Records

005525

Retain 3 years after last test performed, then destroy.

This series documents any test results required to insure that individual meters are calibrated and functioning properly.

Miss Utility Records

005526

Retain 5 years after completion of project, then destroy.

This series documents notification of approaching excavation work by a contractor to the operator of utility lines. Consists of information documenting notification by the contractor, specific location of proposed work, type and extent of work, individual for whom the work is being performed, records of surveying and marking lines, and any additional information required by *Code of Virginia § 56-265.14 et seq.* (Underground Utility Damage Prevention Act).

Personnel Records

These series document the management of staff and administration of benefits to staff; records not otherwise listed on this schedule. Includes accident and incident files, as well as volunteer records.

Refer to *General Records Retention and Disposition Schedule No.3, Personnel Records* for retention periods.



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Plant Equipment and Maintenance History Records

005527

Retain until equipment/pipeline is retired or disposed of, then destroy.

This series documents the service and repair history of all equipment, including water and sewer pipelines, specific to wastewater and waterworks treatment plants, pumping stations, water towers and distribution systems.

Right of Way Files

005528

Retain 5 years after expiration of right of way and/or all subject property removed, then destroy.

This series documents right of ways obtained or given by a public utility.

Utility Billing Records

005529

Retain 3 years or until audited, whichever is longer, then destroy.

This series documents the calculation and payment of customer utility bills. Includes utility billing registers and bill payment stubs from individual customers.

Utility Customer Applications

005530

Retain 1 year after utility service terminated, then destroy.

This series consists of customer applications for utility service.

Utility Customer Complaint Files

005531

Retain 3 years after final resolution of complaint, then destroy.

This series documents utility customer complaints about billing or service. May include contact information of individual customer, nature of complaint, and response to complaint.

Utility Customer Deposit Records

005532

Retain 3 years after refund or forfeiture of deposit or until audited, whichever is longer, then destroy.

This series documents required deposits made for obtaining utility service as well as any refunds given.



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Utility Customer Service Records

005533

Retain 3 years after request is denied or work completed, then destroy.

This series documents requests for service by utility customers for work to be performed by utility department personnel.

Utility Locator Training Records

005534

Retain 5 years after transfer or termination of employment as a utilities locator.

This series documents the training of utility locators in accordance with *Code of Virginia* § 56-265.19(E).

Utility Repair and Maintenance Records

005535

Retain 5 years after completion of work, then destroy.

This series documents repairs and maintenance work completed on customer lines, valves, and meters as part of regularly scheduled service or to restore utility service to customers. May include work orders, radio dispatch logs, and other supporting documentation.

Utility Service Termination Records

005536

Retain 3 years after termination of service, then destroy.

This series documents the involuntary discontinuation of utility service to certain customers because of non-payment of their utility bill or other reasons.

Weigh Tickets/Scale Records

005537

Retain 3 years after the end of the fiscal year, then destroy.

This series documents the control of bulk shipments (coal/refuse) moving in or out of public utility property. Series includes weigh tickets, logs, readings, calibrations, reports, correspondence and related supporting documentation.

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**B. Dams or Other Impounding Structures - Construction, Operation, and Maintenance Records**Dam Construction Files

005538

Retain for life of structure, then destroy.

This series documents the design, construction, and modification of impounding structures such as dams and spillways. Includes, but is not limited to the Dam/Impoundment Construction Permit and Design Report for the Construction/Alteration of Impounding Structures (Form DCR 199-101) which describes the proposed construction/alteration along with detailed plans and specifications for the proposed project, erosion and sediment control plans, an approved emergency action plan, a proposed operation and maintenance plan, and a detailed engineering design report with drawings and specifications. Refer to 4VAC50-20-70(B).

Dam Operations and Maintenance Certificate Files

005539

Retain for life of structure, then destroy.

This series consists of documentation required to issue both the initial and subsequent Operation and Maintenance Certificates for Class I, II, and III Impounding Structures. Includes but is not limited to the certificate application form (DCR 199-099), complete set of as-built drawings certified by a professional engineer, as-built report, approved operation and maintenance plan, approved emergency action plan, and copy of the construction inspection certificate. New documentation is required to be submitted to the Virginia Soil and Water Conservation Board for certificate renewal every 6 years. Refer to 4VAC50-20-100 and 4VAC50-20-110.



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Dam Owner's Annual Inspection Report

005540

Retain 6 years after last certification or inventory report filed, then destroy.

This series consists of the dam owner's report of annual inspection (DCR 199-098) for class I, II, III, IV impounding structures, when no professional certification is required. These reports are due each year for class I and II impounding structures when a certified re-inspection report is not required by 4VAC50-20-100 and 33CFR222.6.

Dam Owner's Certified Re-Inspection Report

005541

Retain 6 years after last certification or inventory report filed, then destroy.

This series consists of the dam re-inspection report (DCR 199-105) for class I and II impounding structures, certified by a professional engineer in accordance with 4VAC50-20-100. Includes an update of conditions based on a previous safety inspection, re-inspection report, or as-built report. A copy of the most recent re-inspection report is required to be filed as part of the certificate renewal process for class I and II impounding structures. Also refer to 4VAC50-20-120 and 33CFR222.6.

Dam Owner's Inventory Report

005542

Retain 6 years after last certification or inventory report filed, then destroy.

This series consists of the dam owner's inventory report for class III and IV impounding structures, required to be filed every 6 years. Includes owner, name and location of the impounding structure, as well as the description, dimensions, history, and condition of the structure. A copy of the most recent inventory report is required to be filed as part of the certificate renewal process for class III impounding structures. Refer to 4VAC50-20-100(G) and 4VAC50-20-120(B).



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**C. Permit Records**Permit Files: Application and Approval Documentation

005543

Retain 3 years after expiration of permit.

This series consists of the approved permit and permit application supporting documentation for various types of water permits issued by the State Water Control Board and/or other regulatory body, not listed elsewhere on this schedule; including the Virginia Pollution Discharge Elimination System (VPDES) Permit, Virginia Water Protection Permit, Virginia Pollution Abatement Permit, Surface Water Withdrawal Permit, and Ground Water Withdrawal Permit. These permits may be required by waterworks systems and/or wastewater treatment systems.

Permit Files: Monitoring Records and Reports – Life of Permit

005544

Retain 3 years after expiration of permit, then destroy.

This series documents the monitoring activities required for various types of water permits issued by the State Water Control Board and/or other regulatory body not listed elsewhere on this schedule; that must be retained for the life of the permit. These may include the Virginia Water Protection Permit, Virginia Pollution Abatement Permit, Surface Water Withdrawal Permit, and Ground Water Withdrawal Permit. These permits may be required by waterworks systems and/or wastewater treatment systems. May include, but is not limited to all monitoring information, including all equipment calibration and maintenance records, original strip chart or electronic recordings for continuous monitoring activities, copies of all reports required by the permit, and all data used to complete the permit application.



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#### Permit Files: Monitoring Records and Reports - Others

005545

Retain 3 years after date of report, then destroy.

This series documents the monitoring activities required for various types of water permits issued by the State Water Control Board and/or other regulatory body not listed elsewhere on this schedule; that do not require retention for the life of permit. Reports include the Pollution Discharge Elimination System (VPDES) Permit. And others. These permits may be required by waterworks systems and/or wastewater treatment systems. May include, but is not limited to all monitoring information, including all equipment calibration and maintenance records, original strip chart or electronic recordings for continuous monitoring activities, copies of all reports required by the permit, and all data used to complete the permit application.

## D. System Design and Construction Records

#### System Design and Construction: Drawings and Plans

005546

Retain permanently in locality.

This series documents the design, construction, and ownership of public utility systems. May include, but is not limited to final plans, as-built drawings, highway agreements or permits, construction permits, and title documentation.

#### System Design and Construction: Supporting Documentation

005547

Retain 5 years after project completion, until completion of audit, until all terms of relevant contracts or agreements have been fulfilled, or until no longer administratively or legally useful, whichever is longer, then destroy.

This series consists of supporting documentation for series 005546, "System Design and Construction: Drawings and Plans". May include, but is not limited to correspondence, specifications, working plans and drawings.

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**E. Wastewater Systems Records**Wastewater Sewage Sludge Application Records

005548

Retain 5 years after end of calendar year, then destroy,  
9VAC25-31-580.

This series documents sewage sludge use and disposal activities.

Wastewater System Operating Permit Files

005549

Retain 5 years after expiration, then destroy.

This series consists of the operator's Virginia Pollutant Discharge Elimination System (VPDES) permit issued by the Virginia Department of Environmental Quality. Includes the permit application, correspondence, and other supporting documentation. Permits are issued for five-year periods. This information is maintained by the Department of Environmental Quality.

Wastewater System Operations Records

005550

Retain 3 years, then destroy, 9VAC25-110-80 Part II (B)(2).

This series documents the operation, maintenance, and laboratory testing of wastewater treatment systems. Includes, but is not limited to monitoring information such as laboratory testing data, chemical records, flow and loading data; equipment/instrument calibration records, original strip chart recordings, records and reports required to be kept in accordance with the permit.



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## F. Waterworks Systems Records

### Waterworks Bacteriological Records

This series documents bacteriological analyses for local drinking water supplies. Includes data, documentation, and reports for total coliform evaluation and other bacteriological monitoring as required by permit. Sampling frequency is regulated by 12VAC5-590-370(A).

005551

Retain 5 years after end of calendar year, then destroy, 40CFR 141.33(a) ; 12VAC5-590-550(A).

### Waterworks Chemical Analysis Records

This series documents chemical analyses for local drinking water supplies. Includes data, documentation, and reports for inorganic/organic/disinfectant residuals monitoring, disinfection byproducts and byproduct precursors monitoring, disinfectant residual monitoring, disinfection byproducts and byproduct precursors monitoring plan, unregulated contaminants monitoring, and filtration/disinfection monitoring. Sampling frequency is regulated by 12VAC5-590-370(B).

005552

Retain 10 years after end of calendar year, then destroy, 40CFR 141.33(a); 12VAC5-590-550(B).

### Waterworks Consumer Confidence Reports

This series consists of a required annual water quality report to customers of the individual waterworks owner. Refer to 12VAC5-590-545.

005553

Retain 3 years after issuance, then destroy, 12VAC5-590-545(E)(7).



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Waterworks Copper/Lead Analysis Records

005554

Retain 12 years after end of calendar year, then destroy,  
40CFR 141.91; 12VAC5-590-550(E).

This series documents copper and lead analyses for local drinking water supplies. Includes data, documentation, and reports for monitoring copper and lead in tap water, water quality parameters, and copper and lead in water supplies (source water). Refer to 40CFR141.81 through 141.88 and 12VAC5-590-370(B)(6).

Waterworks Cross-Connection and Backflow Records

005555

Retain 10 years after end of calendar year, then destroy,  
12VAC5-590-550(I).

This series consists of data, documentation, and reports for the cross-connection control and backflow prevention program as required by 12VAC5-590-580. Also includes reports of annual backflow prevention device inspections and operational tests.

Waterworks Individual Filter Monitoring Records

005556

Retain 3 years after end of calendar year, then destroy,  
12VAC5-590-550(C).

This series consists of data, documentation, and reports for monitoring turbidity in individual filters in the water treatment process. Refer to 12VAC5-590-530(C)(1)(b)2.

Waterworks Operator Continuing Professional Education (CPE) Records

005557

Retain 1 year after end of license renewal cycle, then destroy,  
18VAC160-20-109(E),

This series documents training and education required by 18VAC160-20-109 to maintain individual Waterworks Operator Certification.

Waterworks Radiological Records

005558

Retain 5 years after end of calendar year, then destroy.

This series consists of data, reports, and other records that document radiological monitoring for local drinking water supplies. Refer to 12VAC5-590-400.

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Waterworks Sanitary Survey Records

005559

Retain 10 years after last inspection, then destroy, 40CFR 141.33(c); 12VAC5-590-550(G).

This series documents sanitary surveys required by permit to locate and identify health hazards to local waterworks. Includes any reports, summaries, or communications related to the survey. Refer to 12VAC5-590-350.

Waterworks System Inspection Reports

005560

Retain 10 years after last inspection, then destroy,

This series documents the bi-annual inspection of individual water treatment systems conducted by the Virginia Department of Health, Division of Drinking Water. Includes water quality compliance monitoring data, raw water intake/source evaluation, unit process evaluations, and other information.

Waterworks System Monitoring and Regulatory Reports

005561

Retain 10 years after report is filed, then destroy.

This series consists of various reports required by the Virginia Department of Health to document regulatory and permit compliance. Includes but is not limited to Monthly Plant Operating Reports, which include information on gallons of water treated, as well as various laboratory, bacteriological, and chemical analysis reports, Quarterly Disinfectant By-Products Reports; and Yearly Chemical Analysis Report. Refer to 12VAC5-590-530.



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<u>Waterworks System Operating Permit Files</u> This series consists of the operator's permit issued to an individual utilities department by the Virginia Department of Health, Office of Water Programs. Includes the permit, cover letter from issuer, correspondence with regulator, certified copy of maps, plans, and specifications for treatment plant construction, and the engineering description sheet describing the system's water supply, treatment processes, and other relevant information. Refer to <i>Code of Virginia</i> §32.1-172 and 12VAC5-590	005562	Retain 5 years after permit is revoked or superseded, then destroy.
<u>Waterworks System Operation and Maintenance Manuals</u> This series consists of operation and maintenance manuals for all waterworks facilities and water treatment/pumping equipment as required by 12VAC5-590.	005563	Retain for the life of the equipment or facility, then destroy.
<u>Waterworks System Operations Records</u> This series documents the operation of water treatment systems. Includes daily, weekly, and monthly logs/reports, filter and flow charts, pump charts and other reports and supporting documentation not otherwise listed in this schedule. Refer to 12VAC5-590-550(J).	005564	Retain 5 years after end of calendar year, then destroy.
<u>Waterworks Variance and Exemption Records</u> This series documents any variance or exemption granted to a local water system.	005565	Retain 5 years after expiration of the variance or exemption, then destroy, 40CFR 141.33(d); 12VAC5-590-550(H).
<u>Waterworks Violation Correction Records</u> This series documents actions taken by a local water system to correct violations of primary drinking water regulations.	005566	Retain 3 years after last action, then destroy, 40CFR 141.33(b); 12VAC5-590-550(F).

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**G. Water Well Records**Water Well Completion Reports: Locality Owned

005567

Retain 5 years after well abandonment, then destroy.

This series consists of monitoring and testing reports for the excavation and completion of water wells that are owned or operated by the locality. Refer to 12VAC5-590-550(J)(2).

Water Well Completion Reports: Not Locality Owned

005568

Retain 5 years after end of calendar year of the records, then destroy.

This series consists of monitoring and testing reports for the excavation and completion of water wells that are not owned or operated by the locality.